WEATHERIZATION ASSISTANT (NEAT)
<u>DOs</u> AND <u>DON'Ts</u>

DO	DO <u>NOT</u>
Use Client record imported into NEAT via the "Client Information" file exported from eHEAT. A Client Contact record and an Audit record or a "Standalone" Work Order record will be automatically attached to this Client record after properly importing the data files that were exported from eHEAT.	DO NOT create a Client record from scratch via the "Create New Client Record for this Agency" button at the bottom of the Clients tab on the Agency screen.
If an "Audit" WAP Event is created in eHEAT, enter the audit data into the Audit record imported into NEAT via the "WAP Event – Audit Information" file exported from eHEAT. The Audit Name will be a number that corresponds to the WAP Event ID number in eHEAT.	DO NOT create an Audit record from scratch via the "Create New Site Built (NEAT) Audit" button at the bottom of the Audits tab on the Client screen.
If a "Standalone" WAP Event is created in eHEAT, use the "Standalone" Work Order record imported into NEAT via the "WAP Event – Standalone" file exported from eHEAT. If a "Standalone" is being done, the mechanical measures are manually added to the Work Order that was automatically created in NEAT.	DO NOT create a Work Order from scratch via the "Create New Work Order" button at the bottom of the Work Orders tab on the Client screen. (There will be a modification to this requirement to allow more flexibility after version 8.2.4.2)
Create Work Orders from recommended measures that were generated by running the audit via "Run Audit" button.	DO NOT create a Work Order from scratch via the "Create New Work Order" button at the bottom of the Work Orders tab on the Client screen.
Keep an Audit linked to the original Client that it was automatically assigned to via the import of the Client and Audit data files exported from eHEAT.	DO NOT re-assign an existing Audit record to another client by choosing a different client from the Client ID drop-down list on the Audit screen. The Audit record must remain linked to the original client, as it was imported from the eHEAT file.
Assign weatherization measures only to Contractors and Crews that are in the Contractor drop-down lists on the Measures tab of the Audit screen and the Work Order Information tab of the Work Order screen. The entries in this Contractor list MUST have been imported via the eHEAT "Contractor Information" file exported from eHEAT.	DO NOT create contractor or crew entries from scratch via the Contacts tab on the Agency screen. Such entries will not be recognized by eHEAT as legitimate contractors or crews when measures are uploaded to eHEAT.

DO	DO **NOT**
Create auditor entries manually for your agency via the Contacts tab on the Agency screen.	
Assign weatherization measures only to Cost Centers that are in the Cost Center drop-down lists on the Measures tab of the Audit screen and on the Measures tab of the Work Order screen. The entries in this Cost Center list MUST have been imported via the eHEAT "Fund Information" file exported from eHEAT.	DO NOT create cost center entries from scratch via the Cost Centers tab on the Agency screen. Such entries will not be recognized by eHEAT as legitimate fund categories when measures are uploaded to eHEAT.
Attempt to assign a Contractor or Crew to at least some of the recommended measures generated by an audit run (on the Measures tab of the Audit screen), prior to creating a work order (via the "Create Work Orders" button) from those measures. This will ensure that separate work orders are created for measures that have different Contractor/Crew selections. Measures that have no Contractor/Crew selected will be grouped together into one work order. The Contractor/Crew selection can be changed later on the Work Order Information tab of the Work Orders that get created.	If you expect to need more than one work order (e.g. one for mechanical work and one for building shell work), don't leave the Contractor field on the Measures tab of the Audit screen blank for all measures. Leaving the Contractor field blank for ALL measures will generate only one work order.
After importing Client, Client Contact, Audit, and Standalone files into NEAT, check in NEAT to make sure that the expected records are in place. Particularly check that Audit and Standalone (Work Order) records are in place. Re-enter eHEAT and select the Audit and/or Standalone from the drop-down list and press "Confirm Download".	DO NOT press the "Confirm Download" button on the Audit Tool Export Import screen on the WAP Benefits tab in eHEAT until you have checked that NEAT has all of the Audit and/or Standalone records that are expected.
On the Measures tab of the Work Order screen be sure to select a Measure Type from the Measure Type drop-down list for every measure in the work order.	DO NOT leave the Measure Type selection blank for any measures on the Measures tab of the Work Order, if the measures are being sent up to eHEAT to be paid.